

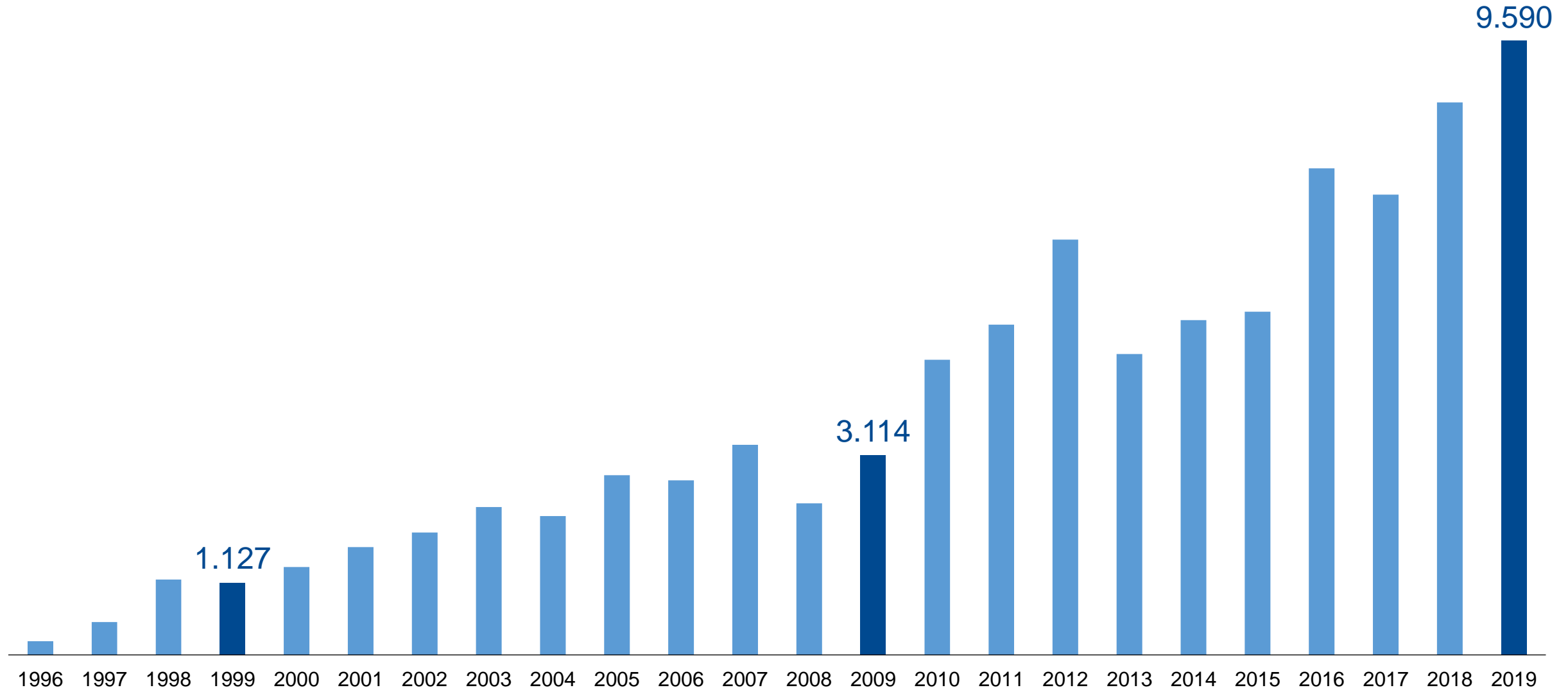


COSMETICA ITALIA

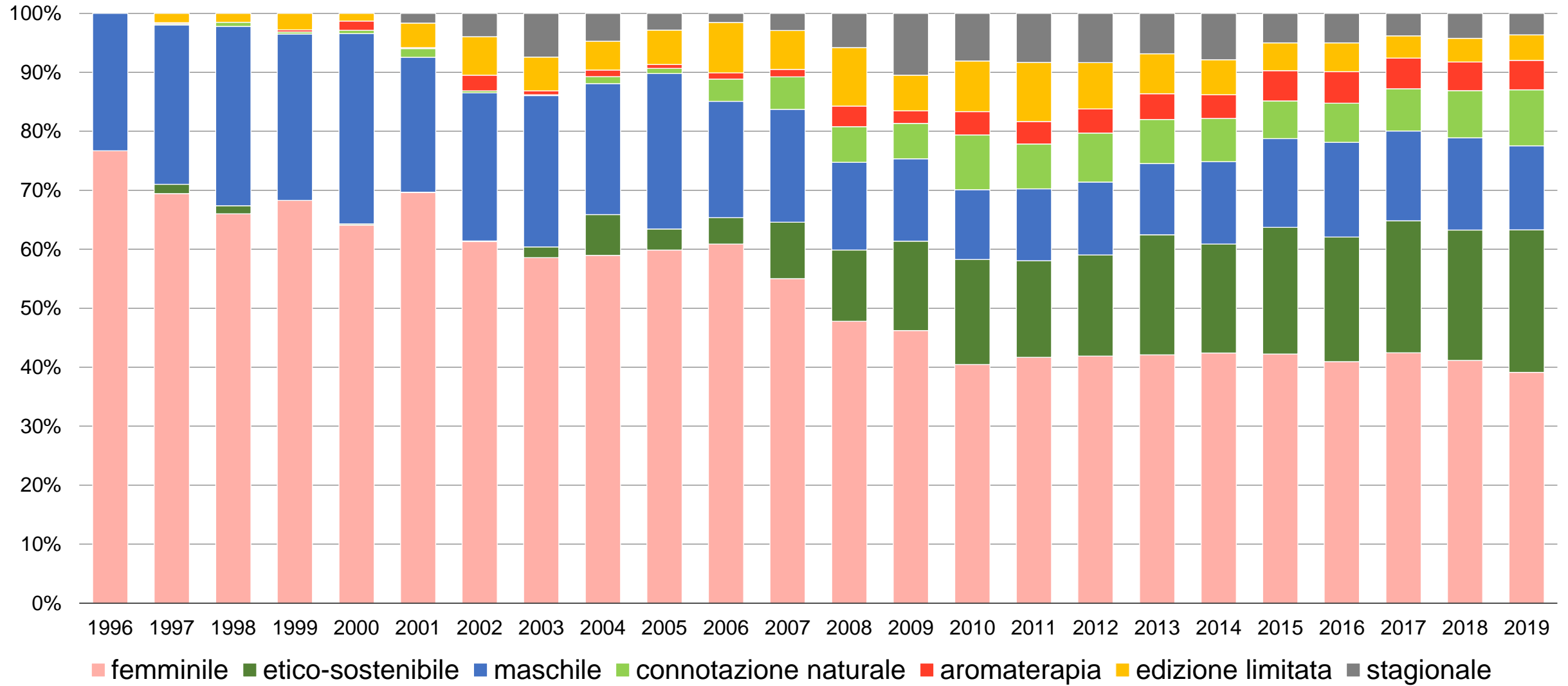
associazione nazionale imprese cosmetiche

Scenario della profumeria in Italia e nel mondo

EVOLUZIONE STORICA MONDIALE DEL NUMERO DI LANCI* DI FRAGRANZE



RIPARTIZIONE STORICA DEI CLAIM A LIVELLO MONDIALE DEI LANCI* DI FRAGRANZE



GLOSSARIO CLAIM: ETICO

Ethical – Animal

Food and Non-Food. For products that support or adhere to certain moral or social ideals that regard the treatment of animals. Common terms include but are not limited to: not tested on animals, against animal testing, free-range, BUAV approved, and dolphin friendly. It should not be used for products that are free from animal ingredients (Vegan/No Animal Ingredients) or where the manufacturer donates money to animal-based charities (Ethical - Charity).

Ethical – Charity

Food and Non-Food. For products that claim to support any charitable organisation to benefit the environment, people or animals – through raising awareness or financial donation. Key charities include: breast cancer, cancer research, projects around the world, cleaner water, etc.

Ethical – Environmentally Friendly Package

Food and Non-Food. For products that claim that the packaging for its product is friendly to the environment. There are many appropriate keywords such as: reduced/reduced weight packaging (where the pack has been made smaller and lighter), recyclable packaging (only when clearly stated on pack – does not include the recyclable symbol), re-usable packaging (does not include refills), made from recycled material, low carbon footprint, FSC approved/certified. Also includes packs that claim for every package they make, they plant a tree etc. Also flagged for packages making vague references to being environmentally friendly or ethical. Some keywords: earth-friendly, eco-friendly, taking care of the planet, reusable packaging, safe for the environment, minimal impact on the environment, and no negative impact to the environment.

Ethical – Environmentally Friendly Product

Food and Non-Food. For products that claim that the actual product is friendly to the environment. Examples include references to biodegradable, made from recycled materials, toilet tissues made from recycled paper, phosphate-free, ozone-friendly, CFC-free, and sustainable ingredients. Should also be flagged for products free from propellants or propeller gas, microbeads or microplastics; references to being environmentally friendly/ethical such as earth-friendly, eco-friendly, taking care of the planet, safe for the environment, minimal impact on the environment, no negative impact to the environment, ethically-sourced or responsibly sourced; climate-neutral; reference to climate change/global warming.

Ethical – Human

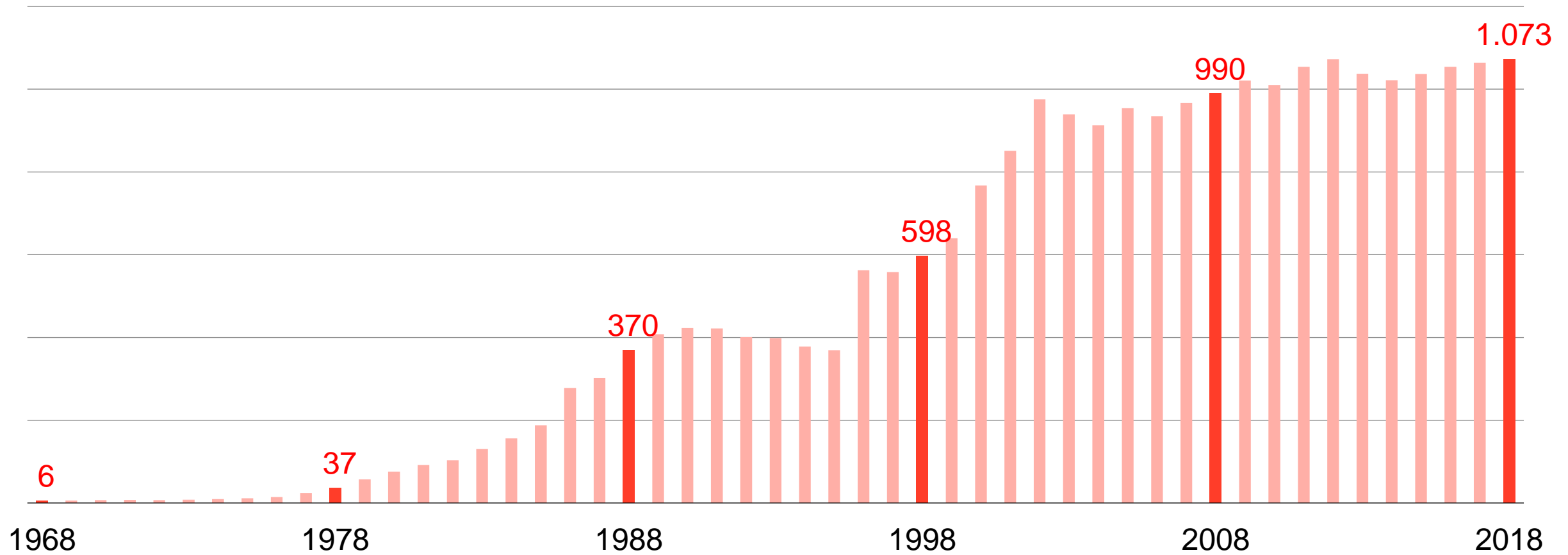
Food and Non-Food. For products that support or adhere to certain moral or social ideals that regard the treatment of people. Keywords include: fair-trade, child friendly (in the terms that they do not work), and community trade.

Non- Food. Used when the term is used on pack and will occasionally be part of the Brand/Range name (i.e. Aromatherapy Associates, Bath & Body Works Aromatherapy). To be selected, this claim should be linked to the fragrance of the product otherwise it may just as easily relate to the effect the product has on the skin. Therefore, this is also to be selected for adjectives referring to a fragrance or its effects as relaxing, invigorating, soothing, calming, etc. The therapeutic effects are most commonly associated with the use of plant extracts or essences. Should not be selected for products that are claimed to be just 'aromatic'.

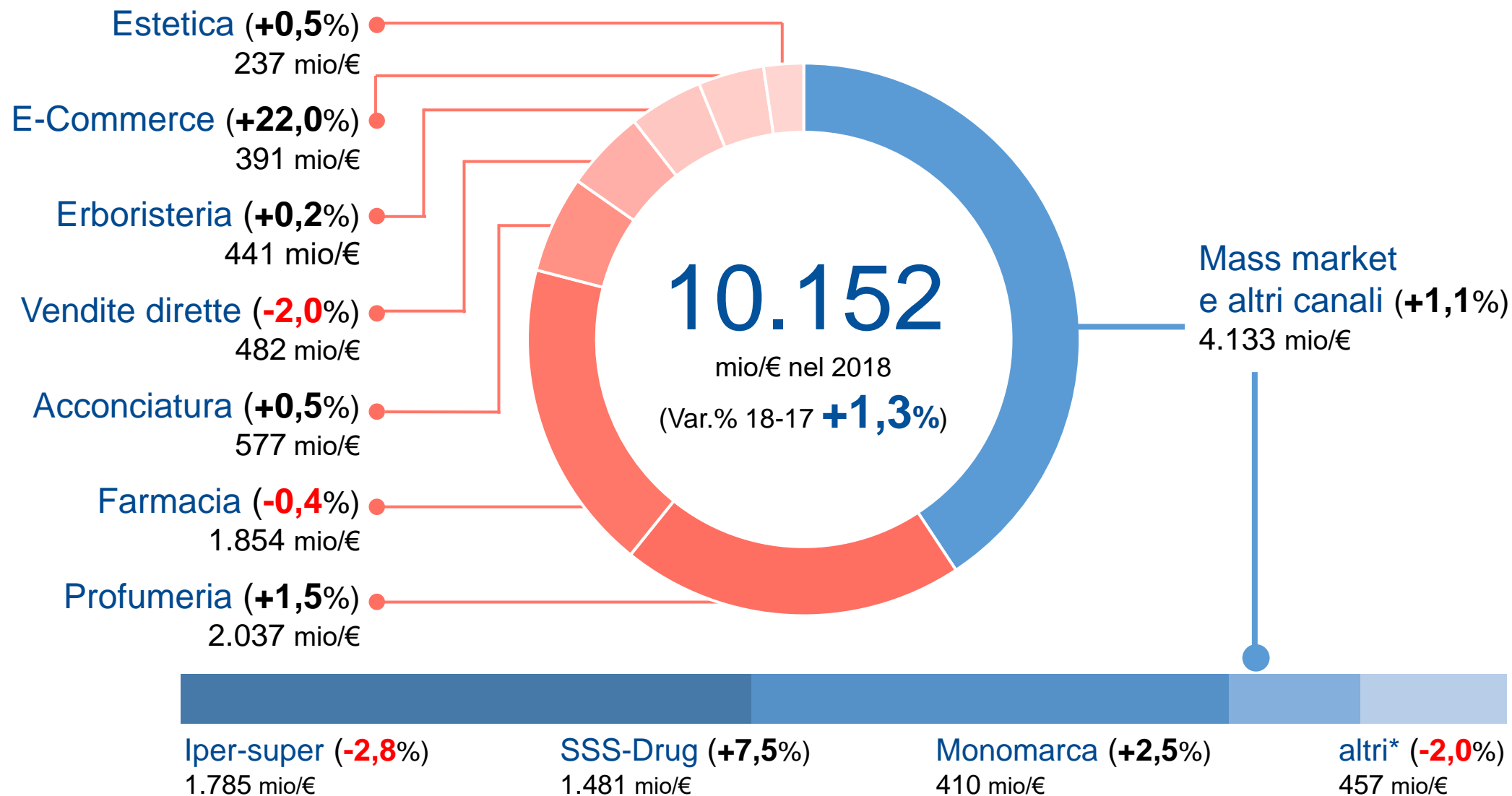
Food and Non-Food. Products marketed as being either available for a limited time or available for a limited time or period. Products that are an edition associated with a year (eg. 2015 edition) are considered Limited Edition, as are special edition and anniversary products. Should not be flagged for products that are available for a specific season/seasonal event (*Seasonal*), or products that have been launched to support a current/upcoming sporting/cultural event (*Event Merchandising*).

Food and Non-Food. Used to identify products designed and marketed for a specific holiday or season. Wording or graphics on pack often pertains to particular holidays and seasons. Some terms include: Christmas, Easter, Halloween, Thanksgiving, and Hanukkah. Also used if a product is only available for Summer, Spring, Autumn/Fall or Winter. Not used if the name of the season is in the branding or product name like *Endless Summer Tanning Lotion*, and product is known to be available long-term. Companies like Boots and Sephora often release gift collections for the Christmas period, these are considered to be seasonal as well.

EVOLUZIONE STORICA IN ITALIA DEL MERCATO (CONSUMI) DELLA PROFUMERIA ALCOLICA (ANDAMENTO ULTIMI 50 ANNI)



I CANALI DISTRIBUTIVI DI PRODOTTI COSMETICI IN ITALIA NEL 2018



EVOLUZIONE DEI CANALI DISTRIBUTIVI VENTENNALE

	1998	2018
Grande distribuzione	42,5	40,8
Super e Iper	34,6	17,6
SSS-Drug	-	14,7
Monomarca	-	4,0
Altri canali GDO	7,9	4,5
Profumeria	25,8	20,1
Farmacia	14,2	18,3
Erboristeria	-	4,3
Vendite dirette: porta a porta e per corrispondenza	7,6	4,7
E-Commerce	-	3,8
Acconciatura	6,8	5,7
Estetica	3,1	2,3

A FINE **2018** IL
MERCATO COSMETICO
(VALORE DEI CONSUMI)
È PARI A **10.152** mio/€

PRODOTTI: CONSUMI PER CANALE NEL 2018

DALLA SPECIALIZZAZIONE ALLA DIVERSIFICAZIONE DI CANALE

ALLOCAZIONE % FATTO 100 I CONSUMI NEL CANALE

CATEGORIE	TOTALE MERCATO	PROFUMERIA	FARMACIA	SSS-DRUG	ERBORISTERIA
CURA PELLE	33,5	26,9	52,2	26,1	43,0
IGIENE E CURA DI SÉ	19,7	1,4	22,0	23,8	17,1
TRUCCO	15,1	20,8	10,0	14,5	15,4
PROFUMI	12,7	40,2	0,9	11,7	11,3
CAPELLI	11,7	1,8	9,8	18,6	6,7
LINEA BAMBINI	3,5	0,2	4,5	3,0	1,2
CONFENZIONI E COFANETTI	2,0	6,8	-	-	-
LINEA MASCHILE	1,7	1,8	0,5	2,2	5,3

Ripartizione % sul totale consumi per canale distributivo, elaborazione Centro Studi

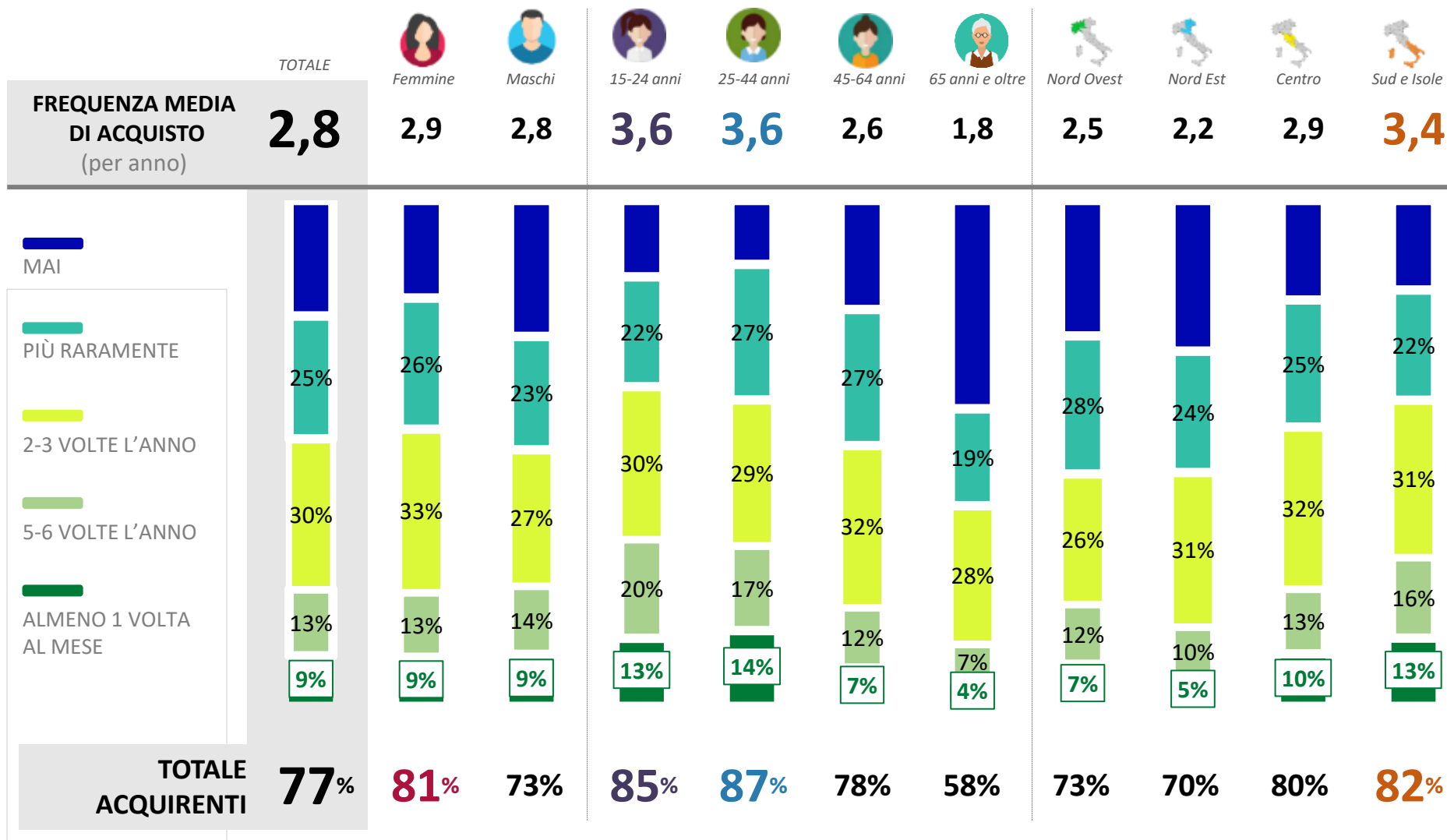


ANALISI ISTITUTO PIEPOLI PER COSMOPROF 2018

PROFUMI E EAU DE TOILETTE

FREQUENZA DI ACQUISTO

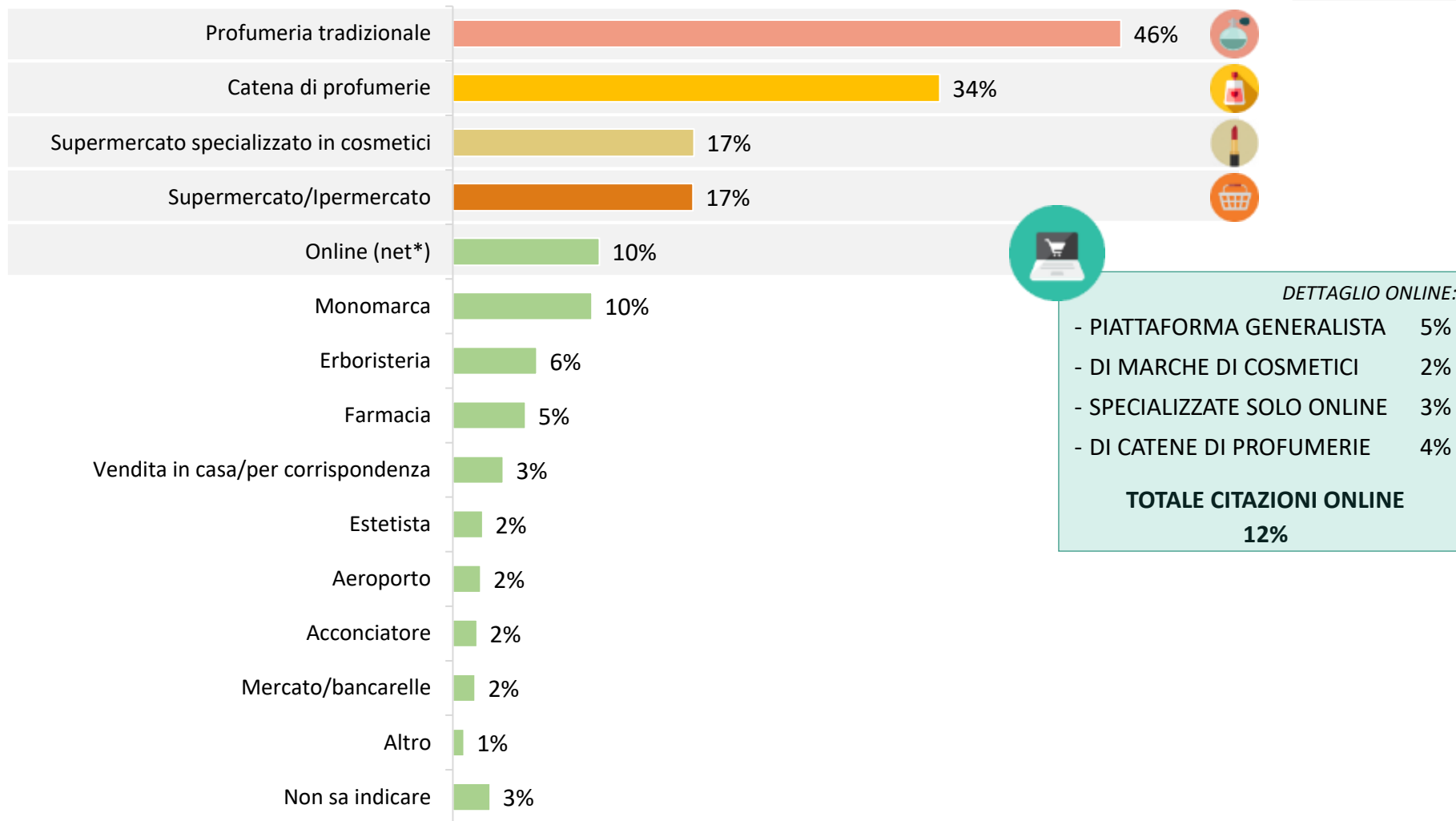
PROFUMI E
EAU DE TOILETTE



Base: totale campione (n=2.010)

CANALI DI ACQUISTO ULTIMI 12 MESI

PROFUMI E
EAU DE TOILETTE



• Nel corso degli ultimi 12 mesi dove ha acquistato profumi e/o eau de toilette?

Base dati: acquirenti profumi e eau de toilette (n=1.547)

Il totale non fa 100 perché sono possibili più risposte
* NET=acquistano su almeno una piattaforma online

CANALI DI ACQUISTO ULTIMI 12 MESI



		Femmine	Maschi	15-24 anni	25-44 anni	45-64 anni	65 anni e oltre	Nord Ovest	Nord Est	Centro	Sud e Isole
Profumeria tradizionale	46%	49%	43%	48%	43%	46%	52%	41%	41%	49%	51%
Catena di profumerie	34%	38%	29%	38%	39%	32%	23%	36%	32%	34%	33%
Supermercato specializzato in cosmetici	17%	16%	17%	20%	17%	17%	13%	17%	17%	17%	16%
Supermercato / Ipermercato	17%	9%	26%	20%	14%	18%	17%	19%	18%	12%	16%
Online (net)	10%	9%	12%	17%	15%	6%	3%	8%	10%	12%	11%
Monomarca	10%	11%	8%	15%	14%	7%	3%	12%	8%	7%	10%
Erboristeria	6%	5%	7%	8%	7%	5%	4%	6%	5%	6%	6%
Farmacia	5%	4%	7%	5%	7%	4%	4%	3%	2%	6%	7%
Vendita in casa/per corrispondenza	3%	4%	3%	5%	5%	3%	1%	3%	3%	2%	5%
Estetista	2%	2%	2%	4%	4%	1%	0%	3%	0%	1%	3%
Aeroporto	2%	2%	2%	2%	1%	2%	4%	2%	2%	2%	2%
Acconciatore	2%	2%	2%	2%	3%	1%	0%	1%	1%	2%	2%
Mercato/bancarelle	2%	2%	1%	2%	1%	1%	2%	2%	1%	1%	2%
N. CANALI UTILIZZATI	1,6	1,5	1,6	2,0	1,8	1,4	1,3	1,6	1,4	1,6	1,7

Base dati: acquirenti profumi e eau de toilette (n=1.547)

In grassetto i primi quattro canali maggiormente utilizzati